



Our Process

GREENLEAF TRUST™



Working with You

We believe that spending time getting to know you and becoming familiar with your goals, opinions and requirements is the most natural place to begin. After all, we can't really create a portfolio that satisfies your objectives unless we know exactly what those objectives are. Together, we'll consider your goals and financial resources, weighing the potential advantages of consolidating assets and coordinating investment strategies across multiple accounts. We'll plot a course that not only allows you to reach or surpass your long-term objectives, but addresses your current needs along the way. This process helps us establish a solid, trusting relationship that strengthens our ability to always serve you well.



From Plan to Action Greenleaf Trust will meet with you to plan and agree upon the strategy we will use to create your investment and financial plan. Using this flexible document as a road map, we'll build a customized investment portfolio (i.e., equities, fixed income and cash) that is consistent with your objectives, and within your personal tolerance for volatility and risk. Of course, tax consequences will be carefully considered in the context of portfolio management decisions. And we'll be glad to work with your tax and legal advisors whenever appropriate.

Account Relationships Greenleaf Trust handles many types of accounts, including: investment management accounts, traditional and Roth IRAs, charitable trusts (such as charitable remainder trusts and charitable lead trusts), foundation and endowment accounts, qualified retirement plans, and revocable and irrevocable trusts.

Customized Service Beyond monthly account statements, quarterly investment performance reports, and face-to-face meetings whenever you wish, you'll find that our proactive, personal approach to service includes open communication and a level of support few others can offer. You will remain comfortably informed, involved and confident that our active management style will enable us to respond and adapt to your changing needs in this fluid global environment.

To learn more about what Greenleaf Trust can do for you, call us at 269-388-9800 or 800-416-4555. You may also visit us at www.greenleaftrust.com.

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